



2012 Advertising Effectiveness Wave 2

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Background & Methodology



- Wyoming Travel & Tourism (WTT) leads the state's travel marketing by placing paid media from April through September in markets across the country in an effort to attract leisure travelers. The organization has been evaluating the effectiveness of these efforts at generating travel by partnering with Strategic Marketing & Research, Inc., (SMARI) for the past seven years. In that time, the reach of the campaign has expanded beyond a handful of markets with a \$3 million budget to a national effort with more than \$5.5 million invested.
- SMARI's evaluation of destination advertising is conducted in multiple waves of interviewing that measure consumer decisions through a number of processes. The initial waves of research for WTT measured the first four steps of the process: the advertising's ability to generate awareness, communicate desired messages, impact the image of the state and influence interest in travel. These four steps were evaluated through two separate waves of interviewing. One measured distant markets where WTT places media in the spring and early summer and one measured nearby markets with media placements later in the season. This, the final wave of the research process, focuses on the impact of the marketing on travel across all markets targeted throughout 2012.
- SMARI's methodology for determining economic impact and ROI is quite conservative as it only attributes a small portion of trips to advertising. There would be visitors to Wyoming even without paid advertising. Thus, the methodology evaluates the level of travel of those households that saw the ads against those that were unaware. It is only the difference between unaware and aware that is considered influenced.



Background & Methodology

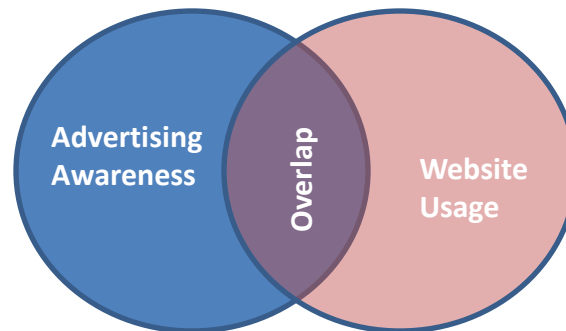


- By establishing the rate of travel by those unaware of the advertising as the base, any additional travel above that level by those aware of the ads is considered influenced or attributable to awareness of the marketing.
- An online survey was fielded in December 2012 and January 2013 and received 1,331 responses. However, in order for the process to yield more accurate results, the ROI and Visitor Profile processes were combined. Through this, more than 18,000 interviews were conducted to determine incremental travel, and the visitor results in this report are based on 560 total interviews.
- Through the two awareness waves of interviewing and this ROI process, SMARI has interviewed in the following markets:
 - **Adjacent:** This includes Salt Lake City, Denver, Billings, Idaho Falls, Butte/Bozeman, Boise, Colorado Springs and Rapid City.
 - **Core:** This market category includes more distant DMAs, including Kansas City; Omaha; Madison, WI; Minneapolis-St. Paul; Wichita; Milwaukee; St. Louis; Oklahoma City; Tulsa; and Portland
 - **Chicago:** This has been an important market for WTT and is evaluated separately.
 - **Insert:** These markets receive the co-op insert but are not represented in any of the above markets.
 - **National:** Any US market not interviewed in another category is considered part of this grouping.
- The following is a summary of the key findings from the research.

Market	ROI Interviews	Incremental Travel Interviews	Visitor Data Interviews
Adjacent	313	2,221	260
Core	342	1,430	38
Chicago	237	959	16
Insert	211	2,948	64
National	228	10,630	182
Total	1,331	18,188	560

Background & Methodology

- In addition to evaluating the influence on the paid advertising, for the first time the influence of the state's website will also be considered. This has been a multi-step, year-long process. WTT placed a capture survey on its website, www.wyomingtourim.org, through which users were asked their site satisfaction and to provide an e-mail address to complete follow-up interviews. More than 8,000 of these capture interviews were completed.
- Those respondents were then e-mailed a follow-up survey that asked for details about their site usage as well as their awareness of paid advertising. Knowing that these two sources are important to DMOs as well as travelers, it is valuable to understand where they intersect. More than 1,200 of the follow-up awareness surveys were completed over the course of the year.
- And finally, those who had gone through the first two steps were then sent a travel survey at the end of the year to evaluate if their usage of the site had resulted in travel or altered behavior. This was the same travel survey used in both advertising effectiveness ROI and Visitor Profiling.



Website Process	Completed Interviews
Capture	8,287
Aware	1,241
Travel	223

Advertising Campaign



- Wyoming Travel & Tourism developed and placed new creative in 2011. The Roam Free campaign replaced Reflections, which had been in the marketplace for more than five years. While the campaign produced good results that year, it was not as strong as what WTT had become accustomed to. In an effort to improve consumer reception to the advertising, WTT revised the campaign for 2012, including new imagery for print and TV as well as voiceover from actor Robert Duvall.
- TV, print and online were placed in the Adjacent, Core and Chicago markets, with billboards in a handful of those markets. In addition, the cooperative insert was placed in a number of other markets. These, as well as other households across the country, had the opportunity to be exposed to WTT advertising through print and online channels. As such, this campaign is considered national in scope.
- The number of targeted households fluctuates as consumers are willing to consider overnight travel. For 2012, the campaign had the opportunity to reach nearly 90 million households.

	2010	2011	2012
Households	88,700,000	92,800,000	92,800,000
Media Spending	\$5,147,692	\$4,539,541	\$5,632,822

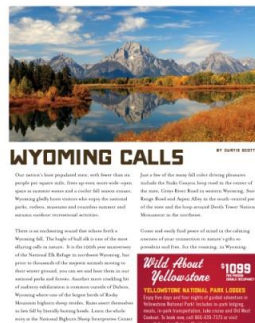


Advertising Campaign



- The media placements in the Adjacent markets were a bit different from those placed throughout the other markets. Not only was the timing of the placement different in that they ran later in the year, but the creative was also different. Throughout the years of marketing to these nearby markets, WTT has found that these consumers need a different message than the rest of the country. While the media placed in the other markets focus on the majesty and serenity of the state, the creative in the Adjacent markets is bold and active. In the awareness waves of interviewing, consumers in these markets responded better to this creative targeting them.
- With a media budget of more than \$5.6 million, nearly 60% of the budget is allocated to TV placements. Given the distribution among the markets, a quarter is going to the nearby Adjacent markets and a third to the more distant Core markets. Given Chicago is an expensive market, nearly 25% of the budget is being allocated there.

Market	TV	Print	Online	Outdoor	Total	% of Budget
Adjacent	\$1,012,142	\$178,530	\$154,133	\$259,962	\$1,604,767	28%
Core	\$1,178,007	\$80,040	\$176,749	\$373,496	\$1,808,292	32%
Chicago	\$1,041,185	\$25,275	\$58,750	\$146,651	\$1,271,861	23%
Co-op		\$300,000			\$300,000	5%
National		\$647,902			\$647,902	12%
Total	\$3,231,334	\$1,231,747	\$389,632	\$780,109	\$5,632,822	
	57%	22%	7%	14%		



Advertising Awareness



- As 2011 was the introduction of new creative after years of Reflections in the TV markets, it was expected that awareness would have been lower last year. Given another year to build, awareness was up from the initial roll-out of Roam Free, reaching nearly as many TV targeted households as the final year of Reflections. However, given the budget targeting these households, the cost to reach an aware household was lower than the previous measurements. Given that SMARI's benchmark for a cost per aware household in spot markets is \$0.50, this remains a little high, an indication the media is not as efficient as it could be at reaching these targeted households.
- While the cost per aware household for these spot markets is high, the campaign is generating higher awareness than SMARI's awareness model would predict. Given these two are in contrast, it could be that WTT could generate similar awareness results with less spending in the spot markets.

Awareness and Cost per Aware Household – TV Markets Only

TV Markets	2010	2011	2012
Targeted HHs	10,861,885	11,550,000	11,550,000
Awareness	67%	56%	63%
Aware Households	7,255,739	6,409,419	7,222,263
Spending	\$5,147,692	\$4,539,541	\$4,684,920
Cost per Aware HH	\$0.71	\$0.71	\$0.65

Advertising Awareness

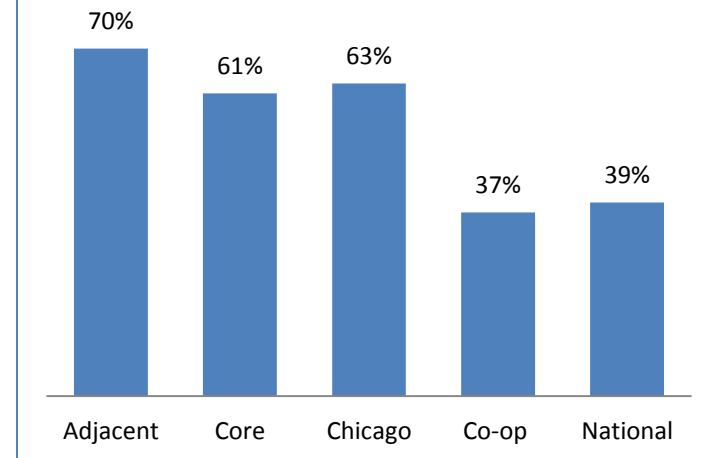


- The WTT campaign is extremely efficient overall. The minimal investment in non-TV markets via the co-op insert and print and online placements generate tremendous awareness for the organization, bringing the overall cost to reach an aware household down to \$0.15. For campaigns attempting to reach a national audience, SMARI sees an average of \$0.25 as the benchmark. With WTT besting this, the overall campaign is good at making use of the available resources.

Total Advertising Awareness

	2010	2011	2012
Households	88,691,191	92,800,000	92,800,000
Awareness	40%	29%	41%
Aware HHs	35,033,021	26,586,467	38,272,588
Spending	\$5,134,465	\$4,536,369	\$5,632,822
Cost/Aware HH	\$0.15	\$0.17	\$0.15

Awareness by Market



Impact of the Advertising

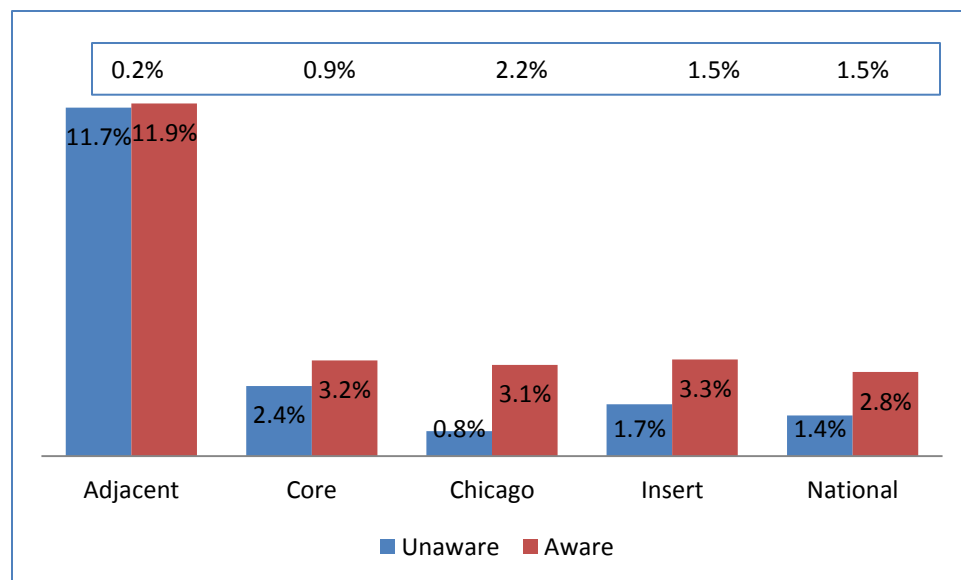


Impact of the Advertising



- Given that there would be visitors to Wyoming even if the state did no marketing, it is important to understand that not all travel to the state is a result of the advertising. It is not even all travel by those who have seen the advertising that determines the impact. The methodology SMARI uses for calculating the impact of the advertising relies on determining incremental travel, which is the difference between the level of travel of those who are aware of the advertising and those who are unaware. The level of travel by those who are unaware is considered the base and any travel beyond that is where the influence lies. For example, if 10% of unaware households visited Wyoming but 15% of aware households visited, the incremental travel is 5%. It is only this level of travel that is considered influenced.
- WTT has seen lots of fluctuation of the impact on the Adjacent markets, with little to no impact in recent years. With high rates of unaware travel from these markets, especially Denver and Salt Lake City, it leaves little room for the advertising to have any influence. The biggest impact is in Chicago where WTT has focused resources over a number of years.
- And while the incremental travel for the Insert and National markets appears small, this is across a large population, which would result in a great number of trips.

Impact on Travel

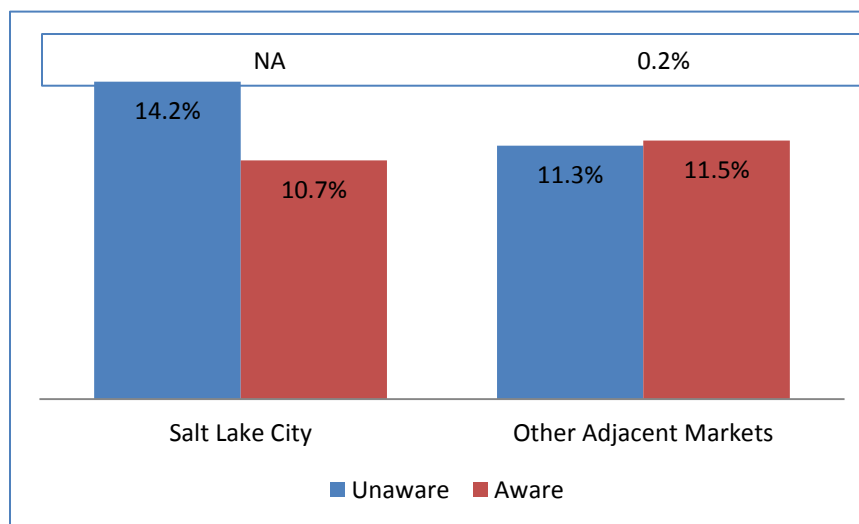


Impact of the Advertising



- Again, with high rates of travel by unaware households, it is difficult for the advertising to have influence in the Adjacent markets. However, there are differences in how these individual markets behave. Salt Lake City, historically the market with the highest rates of travel to Wyoming, has a high rate of travel by unaware households, which is not matched by aware travel, resulting in no impact there. It is the other markets in this group, including Denver and the smaller markets like Boise and Billings, where the incremental travel is generated.
- Given these results in the Adjacent markets, it could be worth exploring if resources could be better utilized elsewhere. While WTT should likely continue to invest to remain in consumers' consideration set, a quarter of the media budget likely does not need to be spent here.

Impact on Travel – Adjacent Markets



Incremental Travel



- Given the level of awareness each market received in the Wave 1 interviewing and the incremental travel derived through the travel wave of interviews, nearly 550,000 trips to Wyoming were a direct result of paid advertising. There are, of course, differences in where those trips come from.
- On the flip side of the issues WTT has with the Adjacent markets, there are the Insert and National markets. While these markets have considerably lower awareness than those targeted with more media, the population here is considerable. Thus, even a small rate of incremental travel results in a tremendous number of trips. With only 18% of the advertising budget allocated here, awareness would likely increase were more resources made available to this broader audience.

Incremental Travel

	Adjacent	Core	Chicago	Co-op Insert	National	Total
Qualified households	2,650,000	6,100,000	2,800,000	12,550,000	68,700,000	92,800,000
Awareness	70%	61%	63%	37%	39%	43%
Aware HHs	1,824,012	3,674,257	1,723,994	4,645,159	26,405,167	38,272,589
Incremental travel	0.2%	0.9%	2.2%	1.5%	1.5%	1.4%
Incremental trips	15,647	31,317	38,458	70,005	386,713	542,140

Repeat Travel



- In addition to generating incremental trips, advertising can also encourage households to take more than one trip. With high rates of unaware travel, generating incremental trips in the Adjacent markets has been difficult for some time. However, WTT has continually been able to encourage visitors from these markets to make more than one trip through use of advertising. While Wyoming visitors who were unaware of the ads took on average of 1.5 trips, but those who were aware of the ads took 1.7, 0.2 trips from the Adjacent markets are considered influenced.
- And for the first time, there is also repeat travel from the Chicago market. With unaware visitors making 1.2 trips, but aware visitors with 1.4 trips, 0.2 trips from this market are also attributable to awareness of the advertising.

Repeat Trips Attributable to Ads

	Adjacent Repeat	Chicago
Qualified households	2,650,000	2,800,000
Awareness	70%	63%
Aware HHs	1,824,012	1,723,994
Travel by aware	12%	3%
Aware HHs visiting	216,659	52,824
Influenced repeat trips	0.2	0.2
Total repeat trips	43,434	8,644

Influenced Travel



- The incremental trips, combined with the repeat trips, result in nearly 600,000 influenced trips in 2012 – more than previously recorded for WTT. But again, it is worthwhile to note that there are dramatic differences in where these trips originate. Considerably fewer trips were a result of spending in the Adjacent, Core or Chicago markets – not only compared to the previous two years, but also as a percentage of the total. The Insert and National markets, where consumers can only be exposed to print and online through minimal investment, produced most of the influenced trips for 2012.
- Much of the increase in the influenced trips from the print and online markets is a result of increased awareness over the previous year. The level of incremental travel is similar to that of 2011, but with far more aware households, there was a larger population over which that influence is applied.
- SMARI has seen a number of clients move from a spot market campaign to one that is national in scope. Many have been successful with national cable buys. Given the influence the insert and national markets were able to produce with modest levels of awareness, this could be expected to grow were more resources allocated here and consumers had the opportunity to be exposed more.

Total Number of Influenced Trips

	2010	2011	2012
Incremental trips TV markets	285,672	252,066	85,422
Incremental trips print & online markets	133,825	291,560	456,719
Repeat trips	-	40,033	52,078
Total influenced trips	419,497	583,659	594,218

Economic Impact



Economic Impact



- With the Adjacent markets producing fewer influenced trips than in previous years, the economic impact from these nearby areas fell. However, trip spending has improved steadily as the economy has improved, thus the overall impact is not far off from 2010 when there were considerably more influenced trips.
- When all the TV markets – Adjacent, Core and Chicago – are considered, there is a notable decline in overall impact. The advertising influenced half the number of trips as it has in the past, dropping the total impact here and lowering the ROI.
- These are expensive markets for WTT as 60% of the budget is spent here on TV. Again, possibly moving to a national instead of a spot strategy could spread those costs across more households and potentially reach a great number of consumers.
- With most of the influenced trips coming from the markets where consumers only had the opportunity to be exposed to print or online, considerable economic impact is coming out of these markets. Though there was modest awareness here, it is spread over such a large population that it results in more aware households than all of the other markets combined. And again, only 18% of the budget is being spent here.

Adjacent Markets	2010	2011	2012
Aware HH	1,303,096	1,329,841	1,824,012
Total impacted trips	81,555	79,659	59,081
Spending	\$871	\$1,116	\$1,154
Economic impact	\$71,061,102	\$88,905,909	\$68,190,662

All TV Markets	2010	2011	2012
Incremental trips	285,672	252,066	85,422
Repeat trips		40,033	52,078
Total	285,672	292,099	137,499
Spending	\$871	\$1,116	\$1,154
Economic impact	\$248,915,264	\$326,005,977	\$158,701,470

Print and Online Markets	2010	2011	2012
Aware HH	27,750,999	19,907,878	31,050,326
Total impacted trips	133,825	291,560	456,719
Spending	\$871	\$1,116	\$1,154
Economic impact	\$116,606,296	\$325,404,240	\$527,144,173

Economic Impact



- Together, the campaign was able to generate \$685.8 million in visitor spending – more than any of the WTT campaigns in the previous six years. The influence across the entire US has only been evaluated for the past three years. The 2012 return on investment value falls between the amount that was generated during the first year the insert and national markets were evaluated and 2011, when there was strong incremental travel in most of the TV markets.
- With additional investment, the ROI was slightly lower. But for the campaign to bring in \$122 for every \$1 invested in media is quite good, besting the SMARI average of \$116 for state DMOs (excluding California which typically pulls in ROIs around \$300).
- Given the tax rate in Wyoming, this means the state sees \$28 million in its coffers that would not be there without the investment in tourism marketing.

Total Economic Impact	2010	2011	2012
Incremental trips	419,498	543,626	542,140
Repeat trips		40,033	52,078
Total influenced trips	419,498	583,659	594,218
Economic impact	\$365,521,548	\$651,410,217	\$685,845,643
Expenditures	\$5,134,465	\$4,539,541	\$5,632,822
ROI	\$71	\$143	\$122
Taxes generated	\$14,986,383	\$26,707,819	\$28,119,671
Tax ROI	\$2.92	\$5.88	\$4.99

Website Influence



Integrating Website Influence

- In addition to the advertising, there are other ways WTT can directly influence trips and/or visitor spending, namely the state tourism website www.wyomingtourism.org.
- Some of those who visit the website are aware of Wyoming advertising, and were influenced by multiple media. Since many of those who use the travel guide and website indicate that they have already decided to visit the state, the impact of these media should be calculated in terms of the additional travel and expenditures that were generated.
- Additionally, the impact of many of these households has already been accounted for in the advertising effectiveness methodology, and they should not be double counted. However, it is still useful to understand the role of the owned media sources in conjunction with the purchased media, as well as the specific impact.
- The goal will be to provide an in-depth understanding of the incremental impact from the owned media, as well as the synergy between the bought and owned media.
- The goal of the integration research is to identify the net impact of the guide and website by evaluating the level of Wyoming travel among those who were not aware of the advertising and were not already planning to visit. The website can have an impact on those who were already planning to visit by influencing them to spend more than those who did not use such resources. Those who were aware of ads could also spend more.
- The following will examine the impact of three groups:
 - Website visitors who were not already planning to visit and were not aware of ads.
 - Website visitors who were not aware of the advertising but were already planning to visit. The influence of this group will be the incremental spending attributable to the website.
 - Website visitors who were aware of the guide and whose incremental spending is attributable to the web.

Website Impact

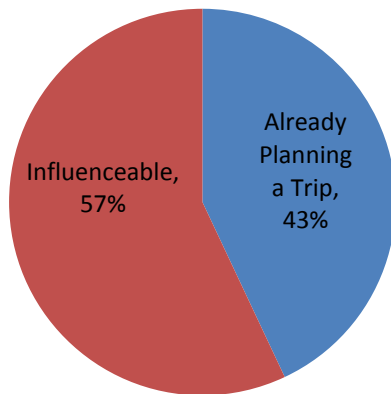
- There were more than 1.5 million unique domestic users of the Wyoming Travel & Tourism website in 2012.
 - Of those, 50% made a trip to Wyoming, resulting in more than 777,000 trips to the state
 - They spent an average of \$1,793 on their trips, resulting in \$1.4 billion total spending in Wyoming
- While it is interesting to see the total revenue associated with the website, we are more interested in the net impact among those who were not already aware of the advertising and who were not planning a trip, as this represents the additional impact not already counted by the traditional ROI effort.

Total Web Impact	2012 Website Visitors
Total US unique users	1,561,625
Travel rate	50%
Influenced travelers	777,311
Avg. trip expenditures	\$1,793
Revenue generated from web visitors	\$1.4 Billion

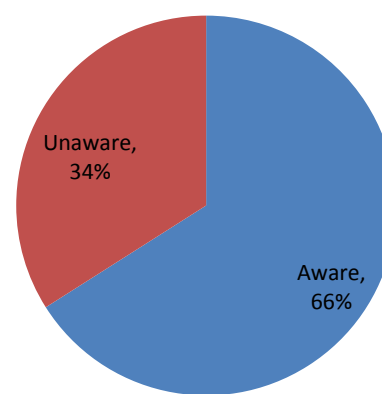
Website Impact

- Through work with destinations and travelers for many years, SMARI understands that many visitors to DMO websites have already made the decision to visit. As such, their subsequent travel cannot be attributed to their usage of the website. Of those visiting www.wyomingtourism.org, 43% had already decided to visit the state, therefore only 57% of website visitors could be influenced by their usage of the site.
- In addition, the influence of the advertising has already been accounted for in the ad effectiveness measurement. Wyoming advertising has high penetration among the advertising targeted markets (41% nationally), but website visitors have even higher awareness, with 66% aware of the campaign. Given the influence of ad aware households are accounted for through the incremental travel measure, only 34% of the consumers not already planning a trip are considered able to be influenced.

**Planning Stage of
Website Visitors**



**Awareness by
Website Users**



Website Impact

- The website can influence those who were not already planning to visit Wyoming to take a trip to the state. As noted, only those who were not aware of the advertising will be counted.
- Given the rate of already planning and awareness, this leaves only 305,000 website visits able to be directly influenced by their visit to the site. Of these, 19% actually visit, resulting in more than 56,000 Wyoming trips and more than \$101 million in direct spending.

Not already planning & unaware	2012 Web Users
Total US unique users	1,561,625
% Not already planning a trip	57%
Not already planning website visitors	887,287
% Unaware	34%
Potential influence	305,227
Rate of travel	19%
Total trips influenced by website	56,786
Spending by website visitor	\$1,793
Revenue attributable to website	\$101,824,089

Website Impact

- As mentioned, the website cannot take credit for trips that occurred by those who were already planning a trip when they landed on the site. But it can provide additional information that results in additional spending as a result of visitation of the site.
- In the 2012 Advertising Effectiveness and Visitor Profile research, the average trip spending was \$1,154. The difference between this level of spending and the level for those who visited the site is considered its sphere of influence. Here, the influence is \$639 in additional spending per trip, or an additional \$110 million.

Already planning & unaware	2012 Web Users
Total US unique users	1,561,625
% already planning a trip	43%
Already planning website visitors	674,338
% unaware	34%
Potential influence	227,145
Rate of travel	76%
Trips for which spending level can be influenced	172,152
Spending by website visitors	\$1,793
Spending by non-website visitors	\$1,154
Spending per trip attributable to the website	\$639
Incremental spending attributable to the website	\$109,989,706

Website Impact

- The website can also have a synergistic impact with the media.
- Again, the level of awareness that the bought media is able to generate makes it difficult for owned media to have influence on their own. However, there is still room for influence on those who were aware of ads in the form of additional spending. Those who both saw ads and visited the website spent \$528 more than the average Wyoming visitor, resulting in \$295.5 million in influenced spending.

Aware	2012 Web Users
Total US unique users	1,561,625
Awareness	66%
Aware households	1,029,412
Rate of travel by aware	54%
Aware website users who visit	560,224
Spending by aware website users	\$1,682
Spending by WY visitors	\$1,154
Incremental spending	\$528
Influenced spending	\$295,523,816

Website Impact

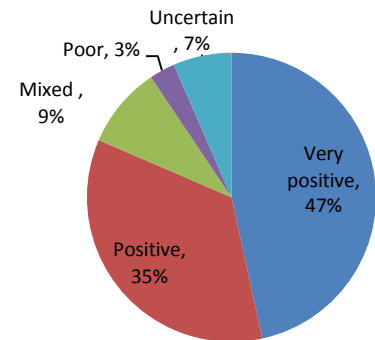
- The total impact of the website when all these influences are added is \$507.3 million.
- Of this, \$101.8 million is attributed to the website on its own, with the additional \$405.5 million coming from influencing those visitors who also saw the advertising or were already planning on coming but promoted additional spending.

	Web influence
Influenced travel (unaware and not already planning)	\$101.8 million
Incremental spending (unaware and already planning)	\$110.0 million
Influenced spending (aware)	\$295.5 million
Total influence	\$507.3 million

Website Satisfaction

- The process of integrating the website with the advertising effectiveness can provide more than just the economic impact. It can provide insights on how consumers use and respond to the web and ways WTT could alter the site to increase satisfaction and resultant travel.
- Most users of www.wyomingtourism.org are positive about their experience on the site. While not many participate in social functions such as commenting or contributing photos, it is this group that is most positive. The more WTT can get users engaged on the site other than looking at events, maps and deals, the more satisfied users will be.

Site Satisfaction



Website Activities	% Participating	% Very Positive
I added a comment, contributed a photo or video or a suggested trip.	3%	68%
I watched a video on the site	18%	68%
I signed up to receive e-mails from Wyoming Tourism	38%	62%
I clicked through on an advertisement on the site (e.g.: banner, picture or text ad) to a business-owned website.	15%	61%
I viewed an electronic version of the WYOMING TOURISM Magazine or other vacation guide.	28%	61%
I read an article, story or itinerary on the website	31%	61%
I ordered a WYOMING TOURISM vacation guide to be mailed to me.	56%	59%
I clicked on a link from the site through to another businesses' website	24%	59%
I clicked through to booking, pricing or availability information on a property	19%	58%
I viewed detailed listing information on accommodation or activities	53%	57%
I looked at deals or specials	39%	57%
I viewed a map	68%	55%
I viewed event information	52%	54%

Website Influence

- While the Visitor Profile collects trip details, it is useful to understand if the website visitor who ends up traveling is any different from the average Wyoming visitor. We saw in determining economic impact of the site that there are certainly differences in the level of spending. This appears to be correlated to the number of nights the website visitors are staying on their trips to the state.
- Not only are those who visit the web staying two more days than those who do not, they also are participating in more activities and seeing more parts of the state. Given this, WTT should be considering how its marketing could better drive consumers to the website.
- Certainly the paid media currently provides the web address, but an evaluation of how the spending could be reallocated to incorporate more media for the markets receiving print and online only could also provide an opportunity for evaluating how WTT reaches consumers.
- While a national cable buy would enable WTT to expand beyond the spot markets, an online strategy for getting more impressions that link directly to www.wyomingtourism.org would expand the number of users to the site. Given the differences in trip specifics of those who use the web – most importantly length of stay and spending – this could be a valuable shift in resources as well.

	Average WY Visitor	Web Visitor
Number of trips	1.5	2.4
Number of nights	2.9	4.9
Number of people	3	3
Kids on trip	24%	.25%
Average number of activities	4.4	6.9
Trip spending	\$1,154	\$1,793

	Average WY Visitor	Web Visitor
Central	24%	33%
Northeast	23%	45%
Northwest	57%	78%
Southeast	31%	36%
Southwest	17%	25%

Total Economic Impact



Economic Impact

- In addition to the media spending, when the website is considered, WTT expenditures dedicated to driving consumers to the source are included. This results in additional expenditures from search engine marketing and e-mail communication.
- Given the influence of all the Wyoming Travel & Tourism media sources – paid advertising and the website www.wyomingtourism.org – the total direct visitor spending for 2012 was \$1.2 billion. Given the inclusion of website influence, this is \$200 in visitor spending for every \$1 the state invests in tourism. And the state sees nearly \$49 million in tax revenue because of this visitor spending.
- The inclusion of the website evaluation was new for WTT, but this is a source of tremendous influence – nearly matching that of the paid advertising.

Total Economic Impact	2012
Advertising influenced trip spending	\$685,845,643
Website influenced travel (unaware and not already planning)	\$101,824,089
Website incremental spending (unaware and already planning)	\$109,989,706
Website influenced spending (aware)	\$295,523,816
Total influence	\$1,193,183,255
Media Expenditures	\$5,632,822
SEM & E-mail Expenditures	\$322,973
Total Expenditures	\$5,955,795
ROI	\$200
Taxes generated	\$48,920,513
Tax ROI	\$8.21

Conclusions and Recommendations



Conclusions



- Wyoming Travel & Tourism saw the highest economic impact of any of its advertising campaigns, with \$686 million in visitor spending. Combined with the influence of the website, WTT was able to generate nearly \$1.2 billion in spending for 2012, for a return on investment of \$200 for every \$1 invested in paid media.
- However, the majority of the influence from the advertising came from the Insert and National markets where there was minimal investment through only print and online placements. 60% of the state's budget was allocated to placements, and it was in these markets where there was little incremental travel. Much of that is in the Adjacent markets, where Wyoming has historically seen high levels of unaware travel, thus making it difficult for the advertising to have influence. Certainly the state has built good awareness here and pulling out of the market entirely could take Wyoming out of consumers' consideration set.
- Rather than a spot market campaign where considerable resources are invested in places that already have high rates of travel to the state, WTT should explore the possibility of moving to a national cable buy. This would expand the audience potentially exposed to the TV creative while maintaining a presence in those areas where the state already performs well. However, the media that is placed should be considered as the creative the Adjacent markets were exposed to performed better at communicating the desired messages – which could be a result of the audience or the creative. Before making the move to a national campaign, it is recommended the ads being placed are tested across all markets.
- This option for a national buy should be considered not only due to the declining levels of incremental travel a handful of markets are generating but also because of the high costs per aware household here. WTT is generating exceedingly high levels of awareness here with a high cost per aware household, an indication the state could be too heavily invested here and could produce similar results with a reduced investment.
- WTT should also explore options for additional online exposure. These placements could easily push consumers to the www.wyomingtourism.org website where users often turn into travelers. Not only that, but those who visit the site behave different from other Wyoming visitors by staying longer, doing more and spending more money.

Appendix – Questionnaire



Questionnaire

Wyoming Office of Tourism
Advertising Effectiveness ROI and Visitor Profile
 December 5, 2012

Thank you for visiting our travel survey. Your opinions are valuable to us! This survey is about travel and vacation choices. This is for research purposes only and is an opportunity for you to give feedback to travel destinations so that they can improve. No sales effort will ever result from your participation.

Before you begin, there are a few things to note about the survey:

- For most questions, simply click on the button of your response and then click on the Next button to go on to the next question.
- If you need to go back to the preceding question to change your response, click on the *Previous* button.
- For some questions, you will need to scroll down to respond to all the questions on a screen.
- To stop at any point, close the browser window. The survey will terminate and you will not be able to re-enter.

S1. What is your ZIP code? ____

S2. First, who in your household is primarily responsible for making decisions concerning travel destinations?

- 1Me
 2Myself and my spouse/partner
 3My spouse/partner → TERMINATE AT END OF SCREENING QUESTIONS

S3. How many vacation or leisure trips have you taken in the past year? A leisure trip would be any non-business trip involving at least one night stay at a location at least 50 miles from your home.

- ☐ None → TERMINATE AT END OF SCREENING QUESTIONS
☐ _____

S4. (ASK UNTIL AD EFFECTIVENESS QUOTA IS COMPLETE) Please take a moment to view the following video clip and answer the question. (INSERT TEST AD AND SET UP OPTIONS FOR HIGH SPEED CONNECTION/DIAL UP CONNECTION)

Were you able to view the video?

- ☐ Yes
☐ NO → TERMINATE AT END OF SCREENING QUESTIONS

S5. What is your age?

1. Under 18 – TERMINATE
 2. 18-24
 3. 25-34
 4. 35-44
 5. 45-54
 6. 55-64

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7. 65 or older

END OF SCREENING QUESTIONS

1. Have you visited any of the following states since the beginning of 2012, for a leisure trip that included an overnight stay? How many overnight leisure trips did you take to each state during 2012?

	States visited in 2012 (check all that apply)	Number of Overnight Visits
Colorado		
Idaho		
Kansas		
Montana		
Nevada		
New Mexico		
Oklahoma		
Oregon		
South Dakota		
Texas		
Utah		
Washington		
Wyoming		
North Dakota		
None of These		

FOR VISITOR PROFILE: IF DID NOT VISIT WYOMING, SKIP TO ADS

2. Did you recommend any of these places as trip destinations to your friends, relatives or co-workers? Which ones? (SHOW LIST OF PLACES VISITED FROM Q1)
3. How likely are you to take a leisure trip to any of the following states in the next year?

	Not Likely	Somewhat Likely	Very Likely
Colorado			
Idaho			
Kansas			
Montana			
Nevada			
New Mexico			
Oklahoma			
Oregon			
South Dakota			
Texas			
Utah			
Washington			
Wyoming			
North Dakota			

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Questionnaire

4. Please tell us a little more about your 2012 overnight Wyoming trip(s). If you are listing multiple trips, the most we will ask you about is 6. Thinking about ...

	Month of trip (DROP DOWN WITH MONTHS – JAN THRU DEC)	How many nights did you stay (let respondent enter number)	Main purpose was to visit friends or family
Wyoming trip(s) [INSERT TRIP #]			

5. Besides this year, had you visited Wyoming for an overnight leisure trip in the previous five years?

1. Yes
2. No – SKIP TO Q6

- 5A. In the past 5 years, how many overnight leisure trips have you taken to Wyoming? _____

[RANDOMLY SELECT WYOMING TRIP SELECTING ONE WHO'S PRIMARY MOTIVATION WAS NOT TO VISIT FRIENDS AND FAMILY FIRST – IF NONE, THEN RANDOMLY SELECT ANY. PLEASE PULL IN MONTH AND LENGTH OF TRIP TO INDICATE WHAT TRIP – EG. 5 NIGHT TRIP IN JANUARY.]

6. Which of the following best describes your visit to Wyoming on your (INSERT LENGTH AND MONTH FROM WYOMING Q4)?

1. Wyoming was my main destination.
2. I was ultimately headed somewhere else, but included a visit in Wyoming.
3. Wyoming was one of several places I decided to visit on this trip.

7. What other states did you visit on this trip?

[INCLUDE STATE LIST WITH CHECK BOXES INCLUDE
NO OTHER STATES VISITED AT END OF LIST]

8. How far in advance did you begin planning that [INSERT LENGTH AND MONTH FROM Q5] trip to Wyoming?

1. Less than 1 month
2. At least 1 month, but less than 2 months
3. At least 2 months, but less than 3 months
4. At least 3 months, but less than 6 months
5. 6 months or more

9. Prior to your (INSERT LENGTH AND MONTH FROM Q5) visit to Wyoming, which of the following sources did you use to gather information for planning your trip?

1. Called 800 number to request info
2. Talked to friends and family
3. Used Internet
4. Contacted individual attraction or event to request information
5. Contacted individual chamber of commerce to request information
6. Other (Please specify _____)
7. None

10. What method of transportation did you use to travel to Wyoming on your (INSERT LENGTH AND MONTH FROM WYOMING Q3) trip?

1. Drove via car, van, truck or SUV

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2. Drove via RV
3. Flew/airplane Specify airport _____
4. Bus or motor coach trip
5. Motorcycle
6. Other (Please specify _____)

12. Including yourself, how many people were in your travel party? _____

ASK IF Q12 > 1

13. With whom did you travel...

- ☐ Spouse / significant other
☐ Child(ren)/Grandchild(ren): age 0–12
☐ Child(ren)/Grandchild(ren): age 13+
☐ Other Family
☐ Friends/Acquaintances

14. What forms of lodging did you use during your trip? (Mark all that apply.)

1. Hotel, motel, inn, lodge, bed & breakfast or resort
2. Dude ranch
3. RV park/Campground
4. Rental home, condominium or timeshare
5. With friends or family
6. Other (Please specify _____)

15. Which of the following activities did you participate in during your trip to Wyoming? (Mark all that apply.)

<input type="checkbox"/> Hiking or backpacking	<input type="checkbox"/> Visiting Native American sites
<input type="checkbox"/> Visiting a state or national park	<input type="checkbox"/> Attending a Pow Wow
<input type="checkbox"/> Bicycling or mountain biking	<input type="checkbox"/> Attending a festival or fair
<input type="checkbox"/> Mountain climbing	<input type="checkbox"/> Attending performing arts (music/theater)
<input type="checkbox"/> Rock climbing	<input type="checkbox"/> Visiting historical sites
<input type="checkbox"/> Horseback riding	<input type="checkbox"/> Attending a rodeo
<input type="checkbox"/> Hunting	<input type="checkbox"/> Visit archeological site
<input type="checkbox"/> Camping	<input type="checkbox"/> Wildlife watching
<input type="checkbox"/> Snow skiing or snowboarding	<input type="checkbox"/> Bird watching
<input type="checkbox"/> Snowmobiling	<input type="checkbox"/> Scenic drive
<input type="checkbox"/> Canoeing or kayaking	<input type="checkbox"/> Sightseeing tour
<input type="checkbox"/> River rafting	<input type="checkbox"/> Golfing
<input type="checkbox"/> Boating	<input type="checkbox"/> Visiting a dude ranch
<input type="checkbox"/> Fishing	<input type="checkbox"/> Visiting hot springs
<input type="checkbox"/> Visiting museums	<input type="checkbox"/> Shopping
<input type="checkbox"/>	<input type="checkbox"/> Gambling
<input type="checkbox"/>	<input type="checkbox"/> Other

ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:

16. Of these activities, please indicate if there were any that were a major influence when you selected the destination for this trip to Wyoming in [INSERT MONTH]. You may choose up to 3.

INSERT WYOMING REGIONS MAP USED IN WYOMING VISITOR PROFILE QR

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Questionnaire

17. Which of the following regions did you visit during your trip?

1. Central
2. Northeast
3. Northwest
4. Southeast
5. Southwest

18. Which of the following places or attractions did you visit?

Central Region	Northwest Region (Cont.)
Wyoming Pioneer Museum	Wapiti Valley
Casper	Lander
Fort Laramie National Historic Site	Wyoming Dinosaur Center
Register Cliff	National Museum of Wildlife Art
Independence Rock	Sinks Canyon State Park
Torrington	South Pass City State Historic Site
National Historic Trails Interpretive Center	Thermopolis
Douglas	Other (Specify)
Fort Caspar Historic Site	
Guernsey Trail Ruts	
Other (Specify)	
Northwest Region	Southeast Region
Newcastle	University of Wyoming
Devils Tower National Monument	Cheyenne
Sheridan	Laramie
Gillette	Cheyenne Frontier Days
Fort Phil Kearney Historic Site	Old West Museum
Medicine Wheel Passage Scenic Hwy	Rawlins
Big Horn Scenic Byway	Snowy Range Mountains
Buffalo	Saratoga
Other (Specify)	WY State Capitol
	Wyoming Territorial Prison
	Encampment, Medicine Bow National Forest
	Other (Specify)
Northwest Region	Southwest Region
Yellowstone National Park	Museum of the Mountain Man
Grand Teton National Park	Evansston
Jackson Hole	Green River Lakes
Cody	Rock Springs/Green River
Big Horn Mountains	Flaming Gorge National Recreation Area
Buffalo Bill Historical Center	Pinedale
Snake River	Kemmerer
Big Horn Canyon National Recreation Area	Fort Bridger State Historic Site
Wind River Indian Reservation	Fossil Butte National Monument
Snake River Canyon	Afton
Hot Springs State Park	Star Valley
Riverton	Bridger-Teton National Forest
Cody Night Rodeo	Other (Specify)
National Bighorn Sheep Center	

19. Thinking about your overall travel experience in Wyoming, would you say it was...

1. Poor
2. Fair
3. Good
4. Very Good
5. Excellent

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20. To better understand your travel habits, we are interested in finding out the approximate amount of money you and other members of your travel party spent while in Wyoming on your trip in [INSERT MONTH]. Please estimate how much your travel party spent in total on...?

Please complete all fields – best estimate is fine. If no expenditures in a category enter a "0"

Lodging/Accommodations _____
 Meals/Food/Groceries _____
 Entertainment/Attractions _____
 Shopping _____
 Entertainment such as shows, theater or concerts _____
 Transportation such as gasoline, auto rental or flight costs _____
 Other _____

Please take a moment to look at the following ads and answer a couple questions.

PRINT

PRINT ADS:

SHOW INDIVIDUALLY

Wyoming

Wyoming_Devils_Tower.jpg

Wyoming_Tetons.jpg

Wyoming_Yellowstone.jpg

SHOW ON ONE PAGE

- 1_Cover.jpg
- 2_Inside_Left.jpg
- 3_Inside_Right.jpg
- 4_Back_Cover.jpg

FOR EACH PRINT AD ASK:

23. ☐ I have seen this print ad before
☐ I have not seen this print ad before

TV

NOTE FOR ANALYSIS: NOT SHOW IN CO-OP INSERT AND NATIONAL MARKETS

Anthem 2012 WOT0212H-2-21-12.wmv
http://sms9.omniproductions.net/smc/UT12_UTTV1.flv

Boundaries 2012 WOT0112H_2-21-12_1.wmv
http://sms9.omniproductions.net/smc/UT12_UTTV2.flv

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Questionnaire

NOTE FOR ANALYSIS: Adjacent markets only

http://sms9.omniproductions.net/SMC/WY12_WYTV3.flv
http://sms9.omniproductions.net/SMC/WY12_WYTV4.flv

FOR EACH TV ASK

24. How many times have you seen this television ad?

- ☐ Never
☐ Once
☐ A few times

ONLINE

http://www.pointroll.com/PointRoll/AdDemo/WyomingTourism/9971_Barnhart_728x90_Pol_Asadem01Pd1.asp
http://www.pointroll.com/PointRoll/AdDemo/WyomingTourism/9971_Barnhart_300x250_Pol_Asadem01Pd1.asp
http://www.pointroll.com/PointRoll/AdDemo/WyomingTourism/9971_Barnhart_160x600_Pol_Asadem01Pd1.asp

http://demo.pointroll.com/PointRoll/AdDemo/WyomingTourism/Adventurescapes_728x90_Polite_DERIVEPd10.asp

FOR EACH ONLINE AD ASK:

25. ☐ I have seen this ad before
☐ I have not seen this ad before

OUTDOOR

NOTE FOR ANALYSIS: ONLY SELECT MARKETS

RoamFree_Outdoor_R2a12.jpg
RoamFree_Outdoor_R2a13.jpg
RoamFree_Outdoor_R2a2.jpg
RoamFree_Outdoor_R2a3.jpg

NOTE FOR ANALYSIS: Adjacent Markets Only

Adventurescape_OutdoorBoards_Page_1.jpg
Adventurescape_OutdoorBoards_Page_2.jpg

FOR EACH BILLBOARD AD ASK:

26. ☐ I have seen this ad before
☐ I have not seen this ad before

WEBSITE

Insert Screen shot of Website – wyomingtourism.org

27. Have you visited this Wyoming website?

1. Yes
2. No

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The following questions are for classification purposes only, and will help us understand different groups of people.

28. Are you...?

- ☐ Married
☐ Divorced/Separated
☐ Widowed
☐ Single/Never married

29. Including yourself, how many people are currently living in your household? _____

IF Q29=1, SKIP TO Q31

30. How many living in your household are children under the age of 18? _____

31. Which of the following categories best represents the last grade of school you completed?

- ☐ High school or less
☐ Some college/technical school
☐ College graduate
☐ Post graduate degree

32. Which of the following categories best represents the total annual income for your household before taxes?

- ☐ Less than \$35,000
☐ \$35,000 but less than \$50,000
☐ \$50,000 but less than \$75,000
☐ \$75,000 but less than \$100,000
☐ \$100,000 or more

34. Are you...

- ☐ Male
☐ Female

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